SMALL BUSINESS HEALTH OPTIONS PROGRAM

MARKETPLACE

AGENT/BROKER ENROLLMENT USER GUIDE

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The Small Business Health Options Program (SHOP) Marketplace on HealthCare.gov has an Agent/Broker Portal with online enrollment functions. To work with the SHOP Marketplace, all agents and brokers must keep an active SHOP registration. You must complete the SHOP Marketplace Agreement on the Medicare Learning Network, and identity proofing on the Centers for Medicare and Medicaid Services (CMS) Enterprise Portal.

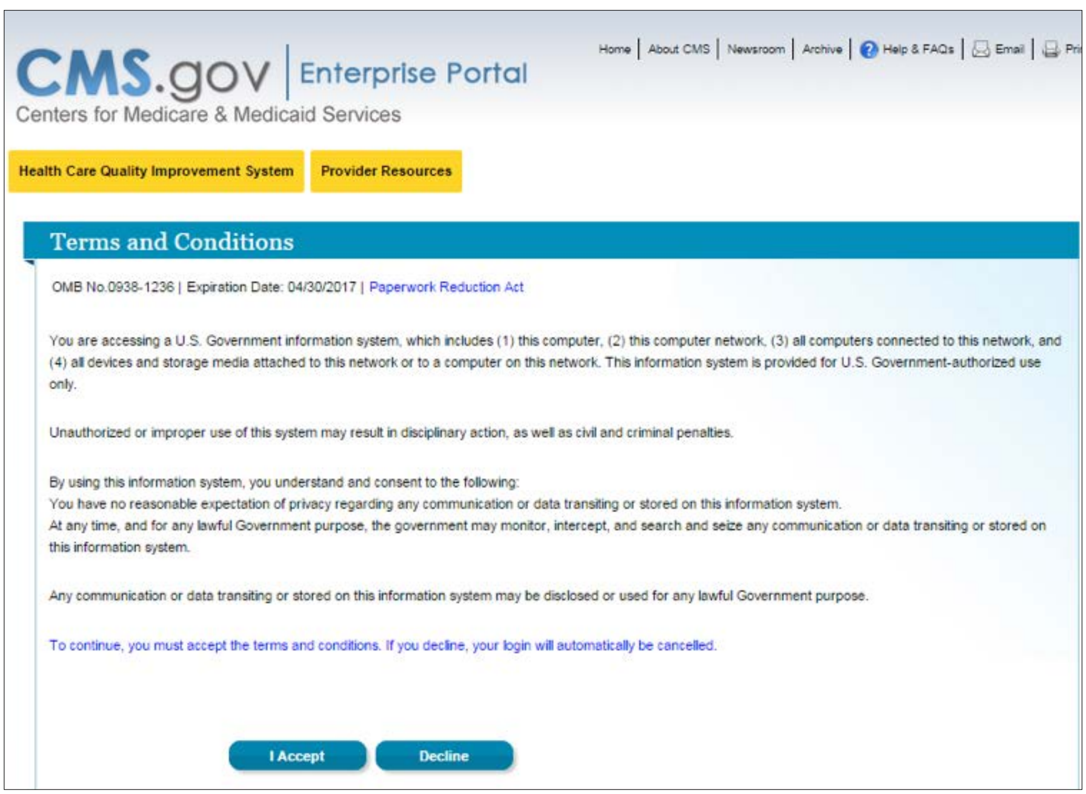
When you complete the Marketplace registration requirements, you'll get a Marketplace User ID that gives you access to the SHOP Agent/Broker Portal on HealthCare.gov. Visit **cms.gov/cciio/programs-and-initiatives/health-insurance-marketplaces/a-b-resources.html** to complete the registration and training requirements for the SHOP Marketplace.

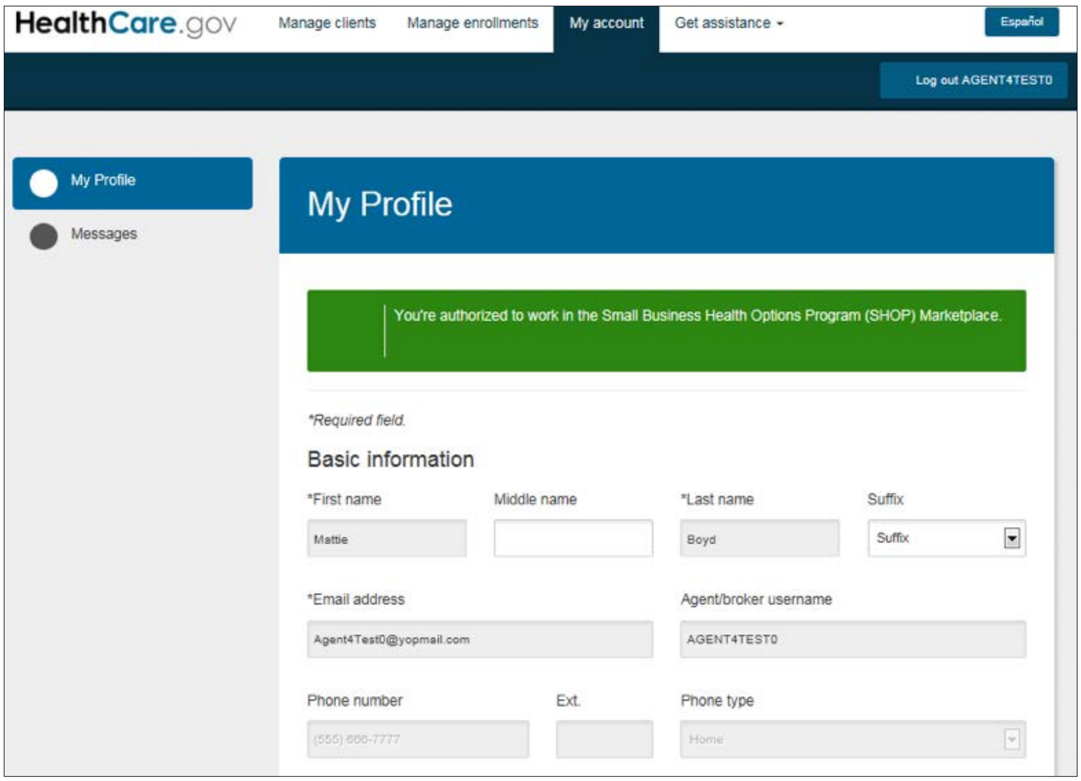
Helping employers enroll in the SHOP Marketplace

As an Agent or Broker, you should follow the same process as employers to complete a SHOP Marketplace application. You'll be able to do the same things that an employer can do. Follow these steps to help employers enroll. For more detailed enrollment instructions, visit **Marketplace.cms.gov/outreach-and-education/enroll-in-shop.pdf**. Remember, employers have to give you authorization before you can help them in the SHOP Marketplace.

Create a profile on HealthCare.gov

- **Log in to the Agent/Broker portal.** Visit **HealthCare.gov/marketplace/small-businesses/agent** and enter your Marketplace User ID and password. Select **LOG IN**.





- **Enter information about you and your agency.** You must keep an active profile on HealthCare.gov to work with the SHOP Marketplace. On the **My Profile** page, enter basic information about you and your agency. All required fields are marked with an asterisk (*). All employers will be able to access this information.

Second phone

Ext.

Phone type: Cell

Preferred language: Select options

Preferred method of contact: Email address

Agency information

*Agency name: AGENT4TEST0

Agency website URL

Agent/broker address

*Street address: 4313 CLARNO DR

Apt./Ste. #

*City: Austin

*ZIP code: 78749

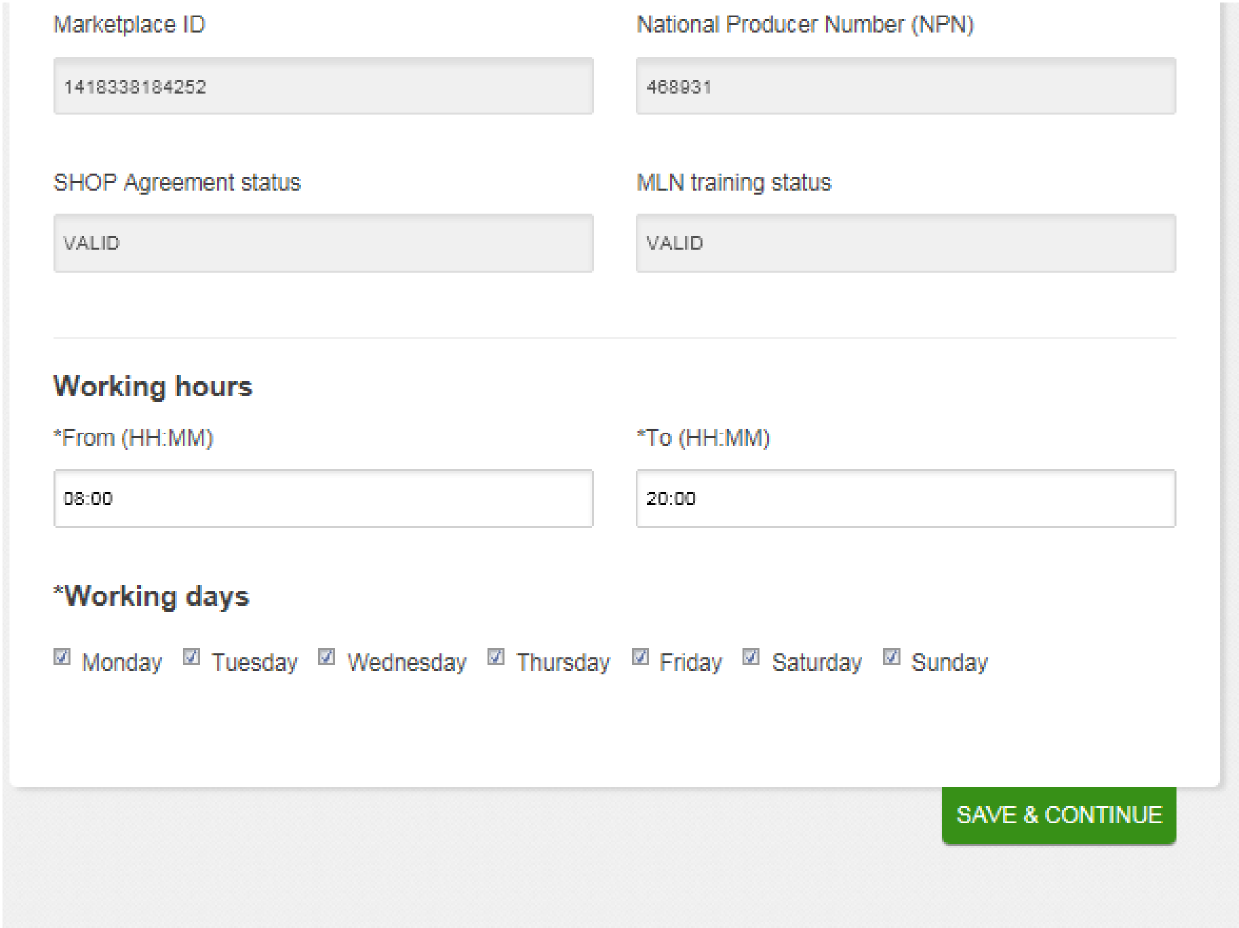
*County: TRAVIS

*State: TX

*Agent/broker Tax Identification Number (TIN): 29-3874982

Marketplace ID: 1418338184252

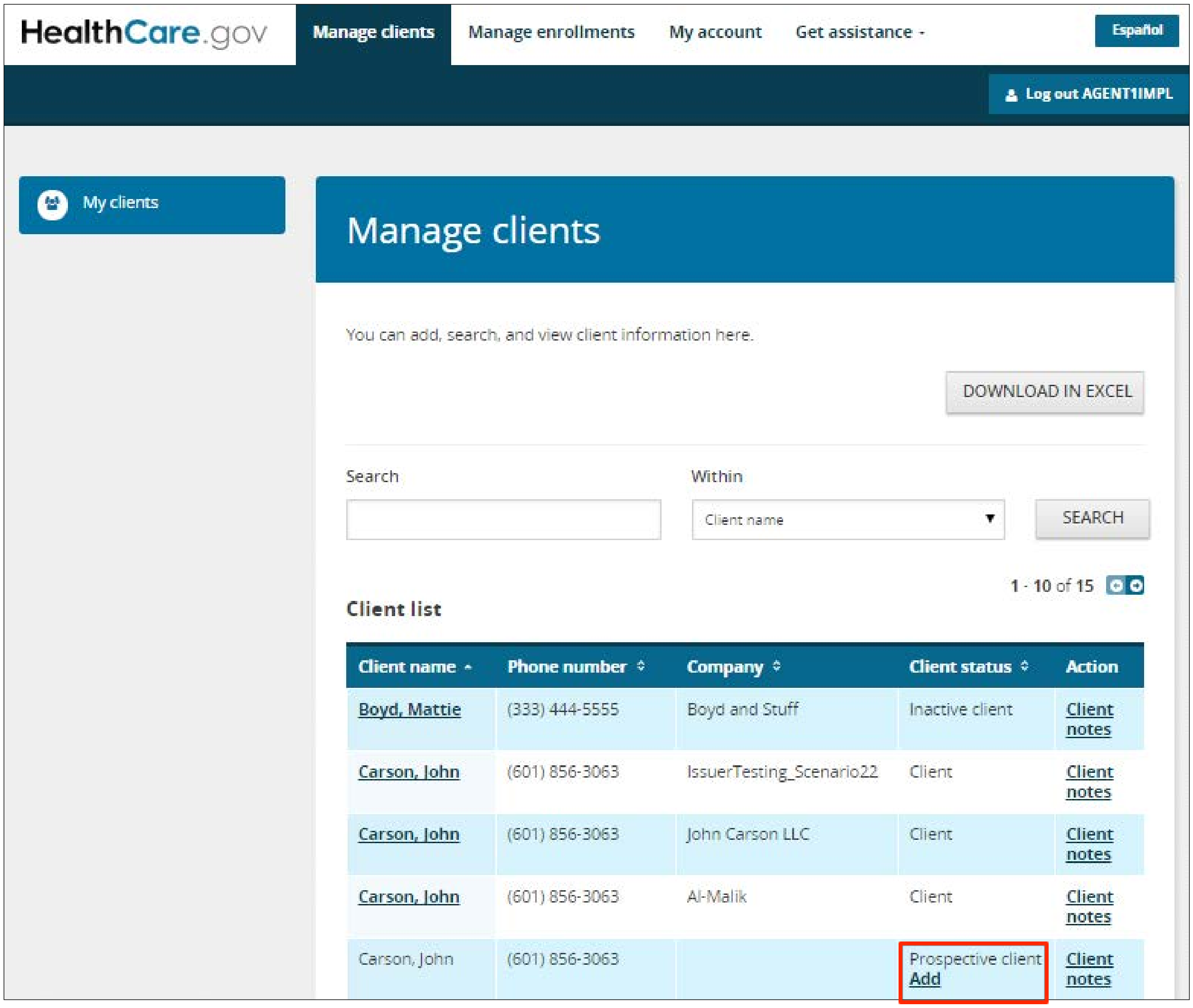
National Producer Number (NPN): 468931

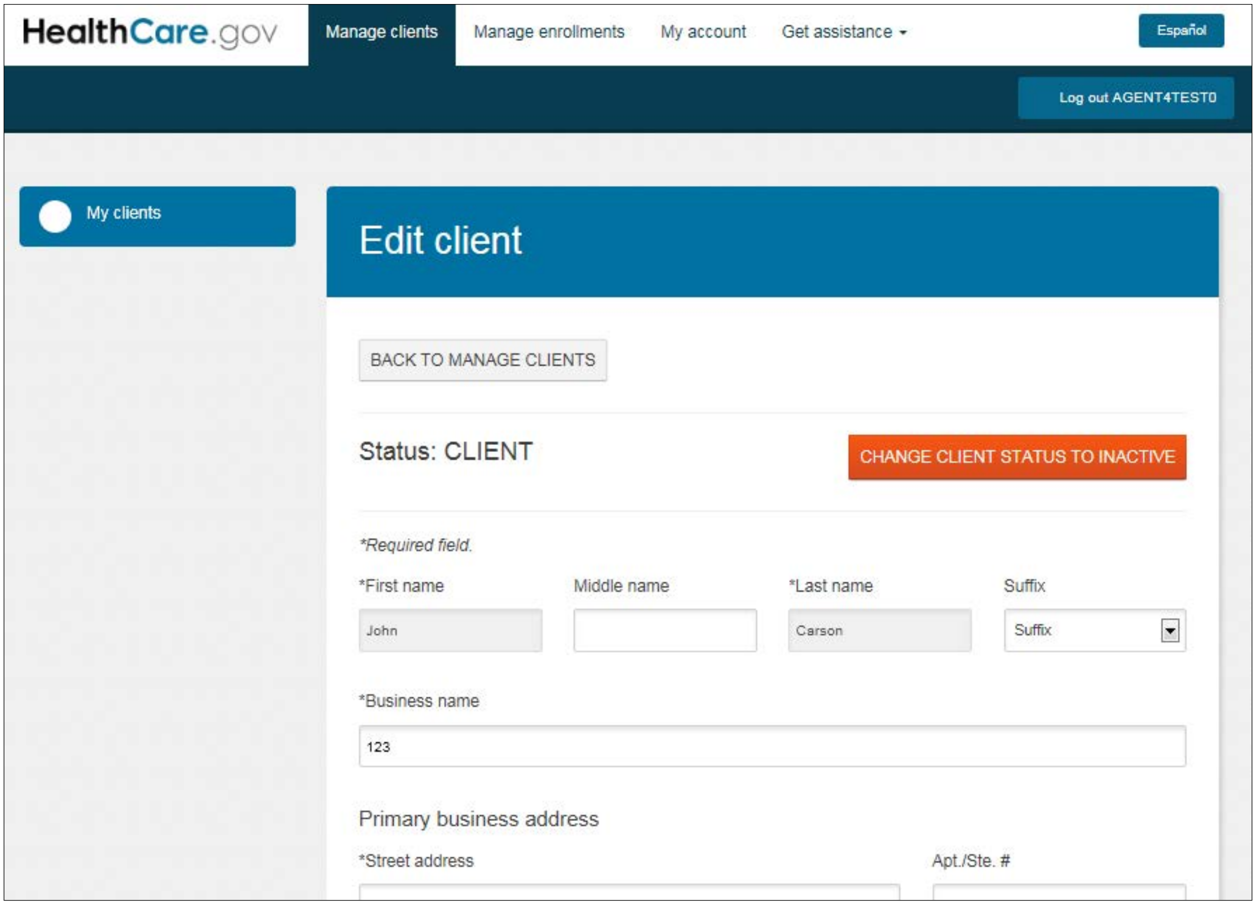


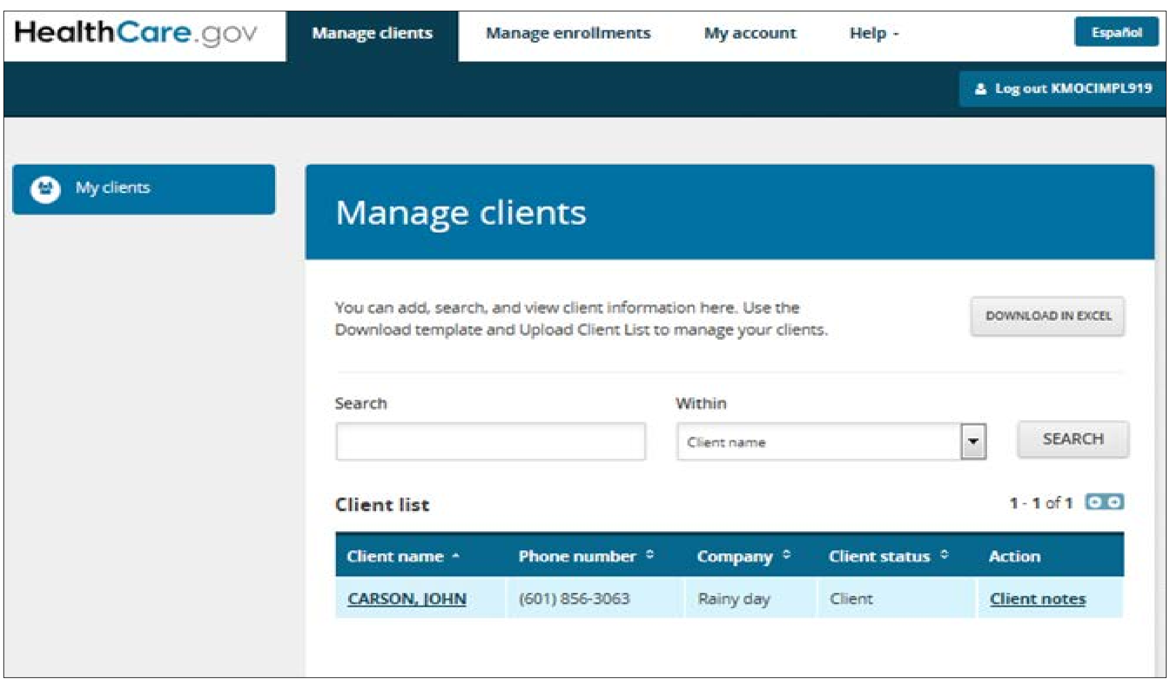
Adding a client

You can add clients only after the employer requests an authorization. To add an employer:

- Select the **Manage clients** tab. On the **My clients** page you'll see a list of your clients.
- Select the **Add** link under the **Client status** field. The client's status should be **Prospect**. On the **Edit client** page you'll see the employer details.
- Select **Add** to enter an employer. On the **My clients** page, the client's status will change from **Prospect** to **Client**.


HealthCare.gov
Manage clients
Manage enrollments
My account
Get assistance
Español
Log out AGENT1IMPL
My clients
Manage clients
You can add, search, and view client information here.
DOWNLOAD IN EXCEL
Search
Within
Client name
SEARCH
1 - 10 of 15
Client list
Client name
Phone number
Company
Client status
Action
Boyd, Mattie
(333) 444-5555
Boyd and Stuff
Inactive client
Client notes
Carson, John
(601) 856-3063
IssuerTesting_Scenario22
Client
Client notes
Carson, John
(601) 856-3063
John Carson LLC
Client
Client notes
Carson, John
(601) 856-3063
Al-Malik
Client
Client notes
Carson, John
(601) 856-3063
Prospective client
Add
Client notes


HealthCare.gov
Manage clients
Manage enrollments
My account
Get assistance
Español
Log out AGENT4TEST0
My clients
Edit client
BACK TO MANAGE CLIENTS
Status: CLIENT
CHANGE CLIENT STATUS TO INACTIVE
*Required field.
*First name
Middle name
*Last name
Suffix
John
Carson
Suffix
*Business name
123
Primary business address
*Street address
Apt./Ste. #


HealthCare.gov
Manage clients
Manage enrollments
My account
Help
Español
Log out KMOCIMPL919
My clients
Manage clients
You can add, search, and view client information here. Use the Download template and Upload Client List to manage your clients.
DOWNLOAD IN EXCEL
Search
Within
Client name
SEARCH
Client list
1 - 1 of 1
Client name
Phone number
Company
Client status
Action
CARSON, JOHN
(601) 856-3063
Rainy day
Client
Client notes

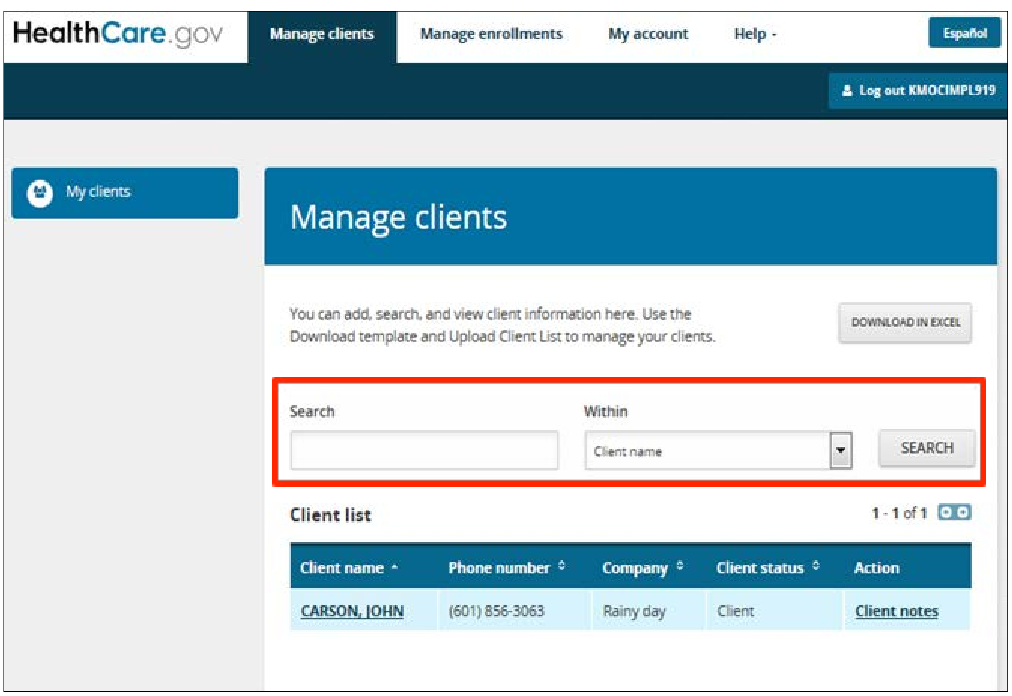
Review client list

In the Agent/Broker Portal, you'll have a list of your existing clients. When you have authorization from an employer, you can make edits to specific employer's information, and sort by client's name, phone number, company name, client type, or client status. You can also add client notes to an employer's account.

Employer's can authorize an agent or broker by clicking on the **Get assistance** tab and searching for a list of agents and brokers registered to work with the SHOP Marketplace by location, your name, or National Producer Number (if available).

To review your list of clients:

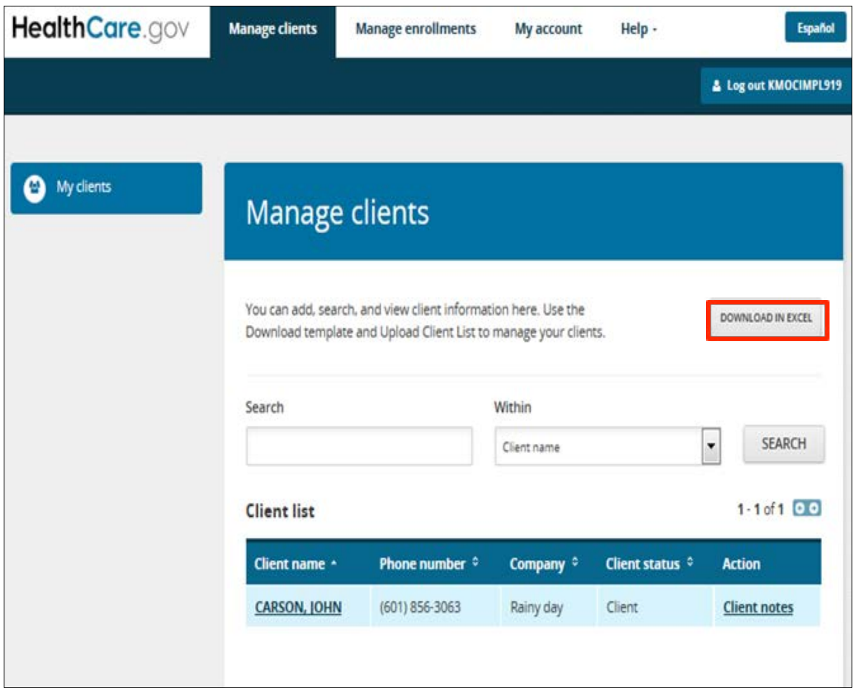
- Select the **Manage clients** tab. On the Manage client's screen, select the drop down menu, under the **Employer** tab.
- Select one of these search criteria from the drop down menu:
  - Client name
  - Phone number
  - Company
  - Client type
  - Client status
- Select **Search**. You'll see the employer's information in the search results. If the employer isn't found, you'll see an error message. You can select other search criteria from the drop down menu to try again.



Downloading a client list

On the **Manage clients** page, you can download an authorized list of clients. You have to get authorization from an employer before they can become a client. Once an authorization is requested by an employer, you can log into your account to accept or decline the pending authorization. If you accept the pending authorization, that employer will appear on your client list. You can download a list of existing clients in MS Excel .xls format. To download a list of clients:

- Select the **Manage enrollments** tab. On the **My clients** page, you'll see a list of your clients.
- Select **DOWNLOAD IN EXCEL**. Choose the file you want and confirm.
- After the file downloads you can save it to your computer.

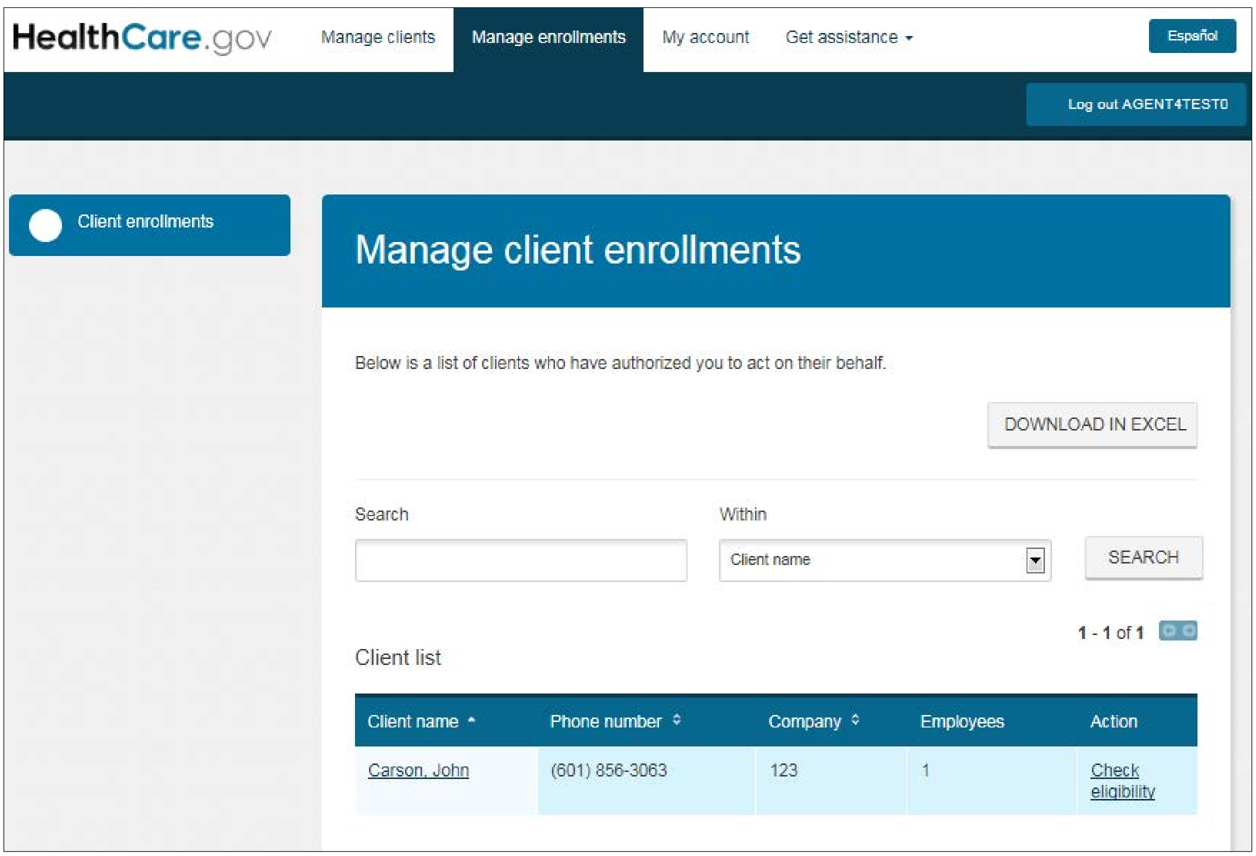


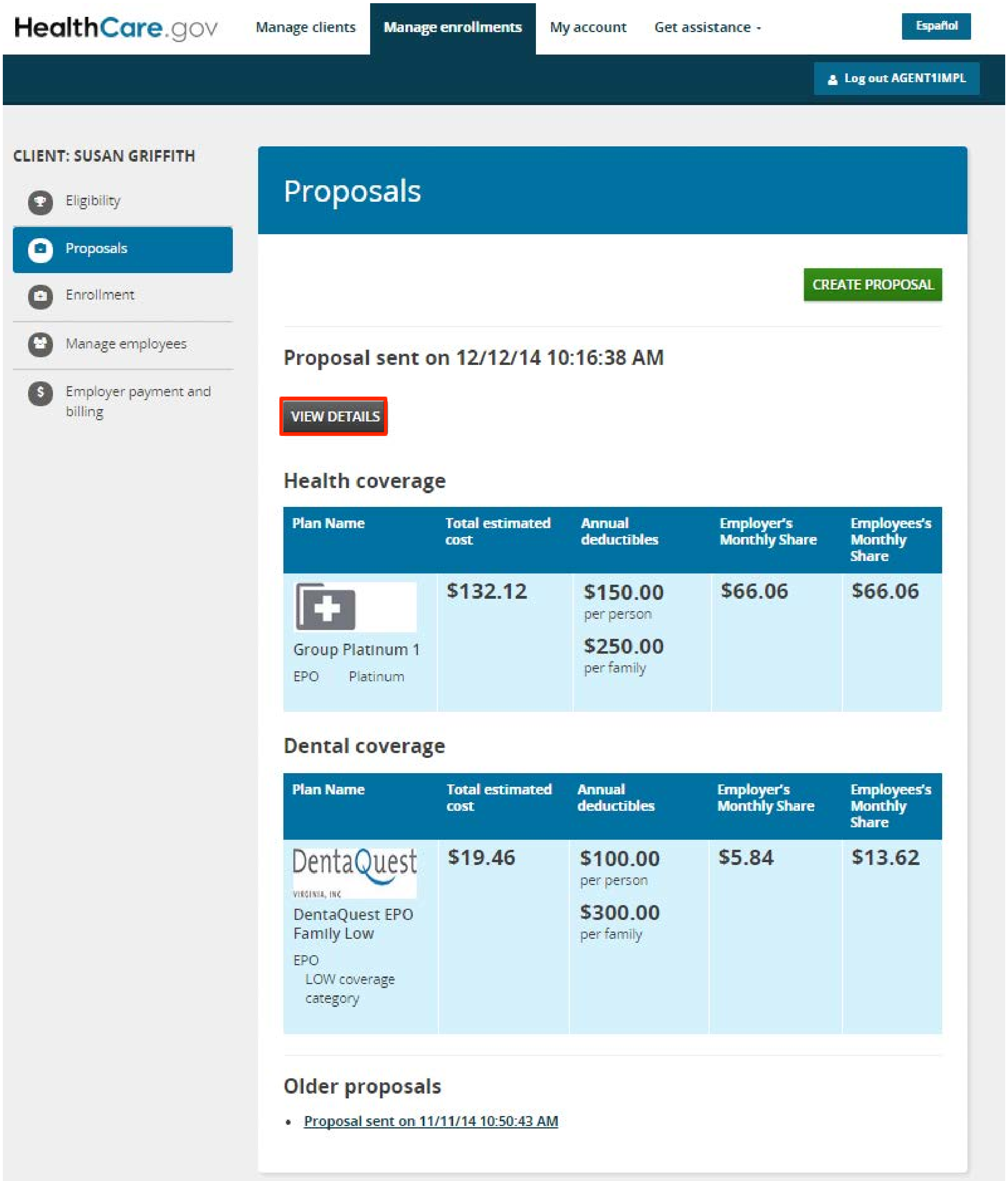
Creating enrollment

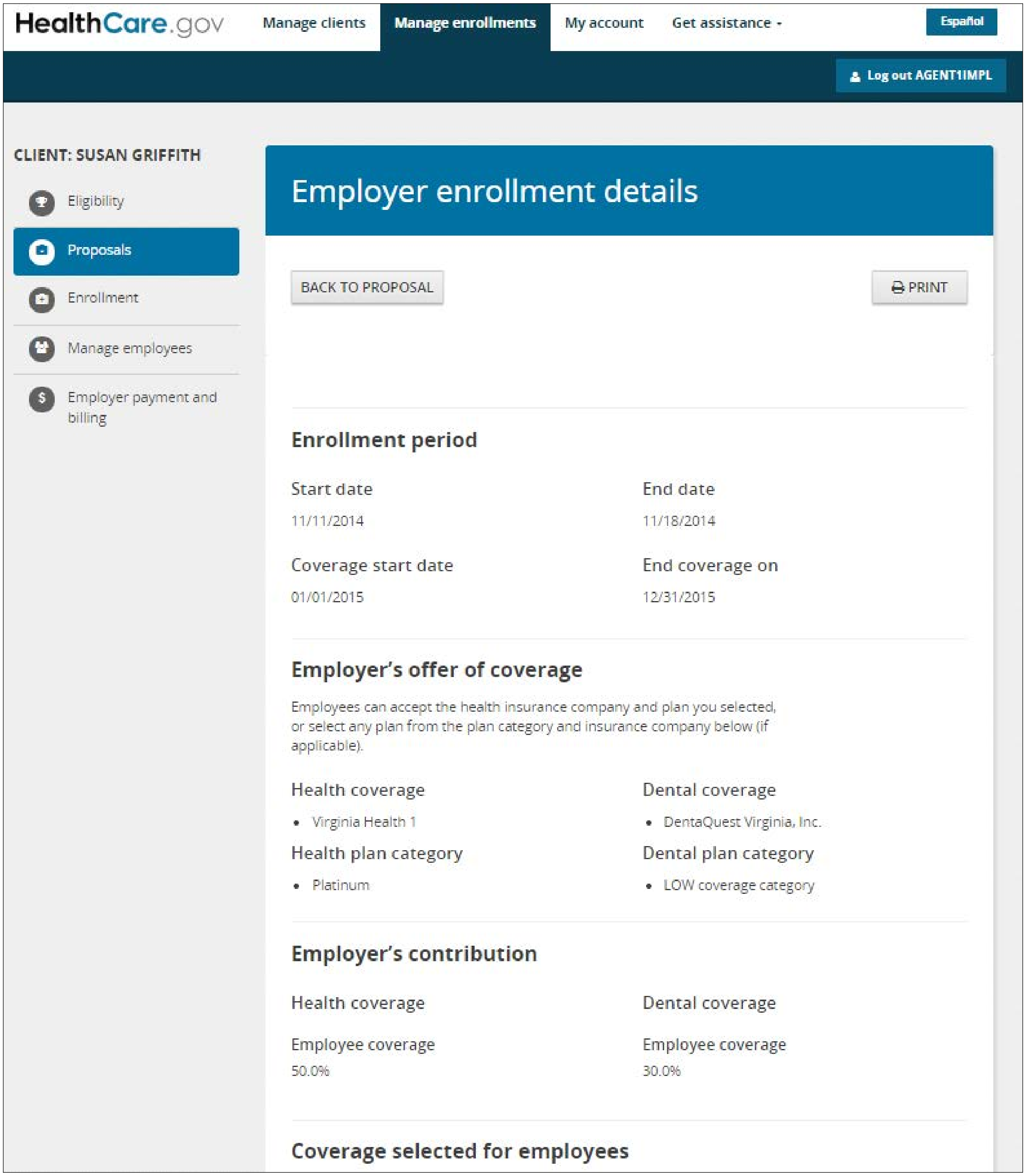
You can help with the enrollment process after you've accepted the employer's pending authorization to become your client. The employer must take the first step to request authorization. Once authorized, you can create an enrollment proposal or finish the employer's enrollment application that's already started. **You won't be able to create an enrollment for an employer if the employer doesn't give you authorization**.

To create an enrollment from a saved proposal:

- Select the **Manage enrollments** tab. On the **My clients** page, you'll see a list of your clients.
- Select the **Proposals** link under the **Action** field of the client list for a specific employer. On the **Saved proposals** page, you'll see the saved proposals for the selected employer.
- Select the **View Details** button on the **Saved proposals** screen to see the **View Employer Enrollment Details** page.
- Select **Create enrollment** on the **View Employer Enrollment Details** screen to confirm your selection and return back to the **My clients** page.




HealthCare.gov
Manage clients
Manage enrollments
My account
Get assistance
Español
Log out AGENT1IMPL
CLIENT: SUSAN GRIFFITH
Eligibility
Proposals
Enrollment
Manage employees
Employer payment and billing
Proposals
CREATE PROPOSAL
Proposal sent on 12/12/14 10:16:38 AM
VIEW DETAILS
Health coverage
Plan Name
Total estimated cost
Annual deductibles
Employer's Monthly Share
Employees's Monthly Share
Group Platinum 1
EPO
Platinum
$132.12
$150.00
per person
$250.00
per family
$66.06
$66.06
Dental coverage
Plan Name
Total estimated cost
Annual deductibles
Employer's Monthly Share
Employees's Monthly Share
DentaQuest
DentaQuest EPO Family Low
EPO
LOW coverage category
$19.46
$100.00
per person
$300.00
per family
$5.84
$13.62
Older proposals
Proposal sent on 11/11/14 10:50:43 AM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CLIENT: SUSAN GRIFFITH
Eligibility
Proposals
Enrollment
Manage employees
Employer payment and billing
Employer enrollment details
BACK TO PROPOSAL
PRINT
Enrollment period
Start date
11/11/2014
End date
11/18/2014
Coverage start date
01/01/2015
End coverage on
12/31/2015
Employer's offer of coverage
Employees can accept the health insurance company and plan you selected, or select any plan from the plan category and insurance company below (if applicable).
Health coverage
Virginia Health 1
Dental coverage
DentaQuest Virginia, Inc.
Health plan category
Platinum
Dental plan category
LOW coverage category
Employer's contribution
Health coverage
Dental coverage
Employee coverage
50.0%
Employee coverage
30.0%
Coverage selected for employees

Employer's contribution

Health coverage

Employee coverage

50.0%

Dental coverage

Employee coverage

30.0%

Coverage selected for employees

Important: It's your responsibility to ensure that all your employees get information about how to enroll in a health plan through SHOP.

Health coverage

INSURANCE CARRIER	Total estimated cost	Annual deductibles	Estimated employer contribution	Estimated employee contribution
Group Platinum 1 EPO | Platinum	$132.12	$150.00 per person $250.00 per family	$66.06	$66.06

Dental coverage

INSURANCE CARRIER	Total estimated cost	Annual deductibles	Estimated employer contribution	Estimated employee contribution
DentaQuest VIRGINIA, INC DentaQuest EPO Family Low EPO | LOW coverage category	$19.46	$100.00 per person $300.00 per family	$5.84	$13.62

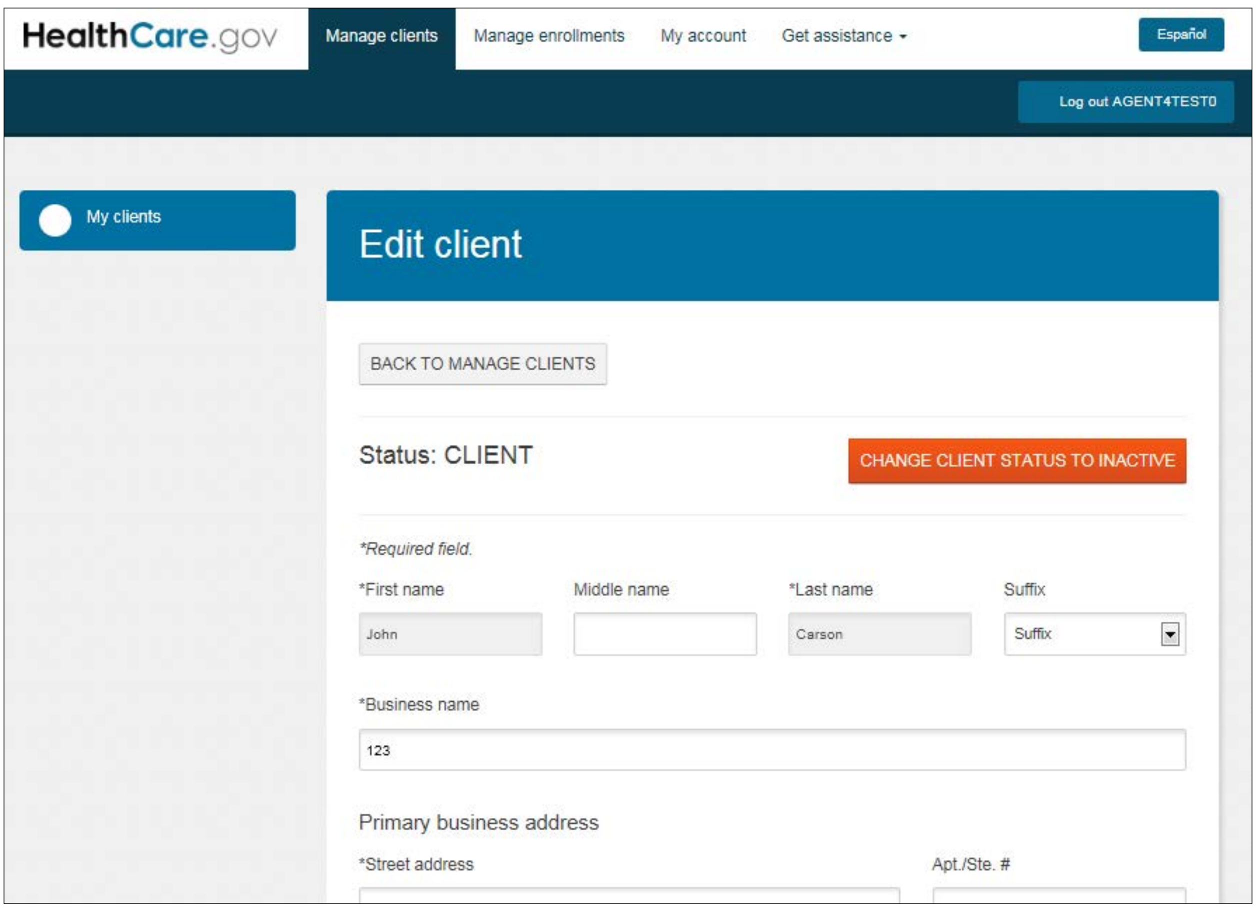
CREATE ENROLLMENT

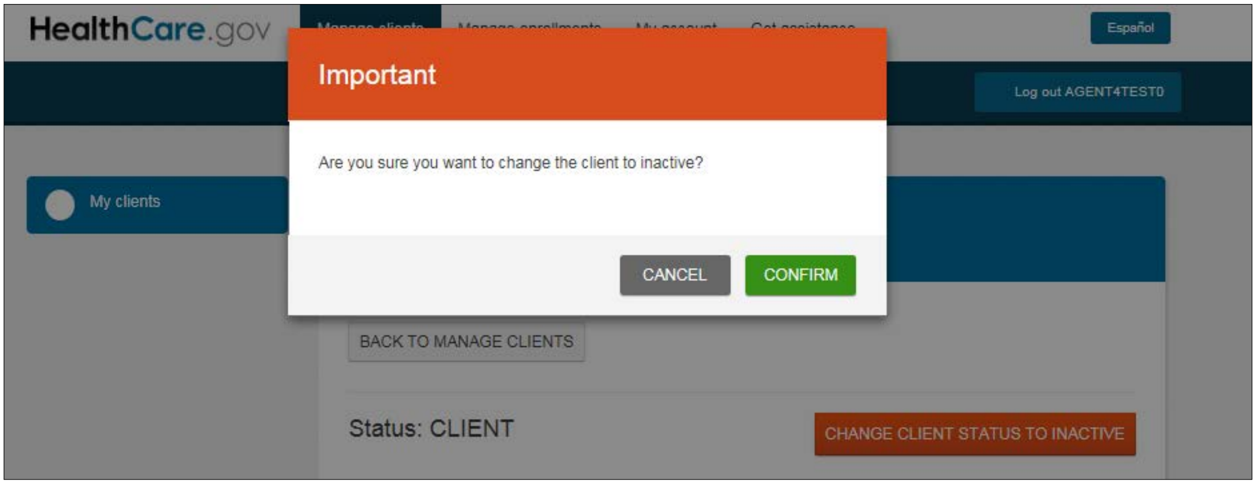
Changing an Employer's Authorization Status

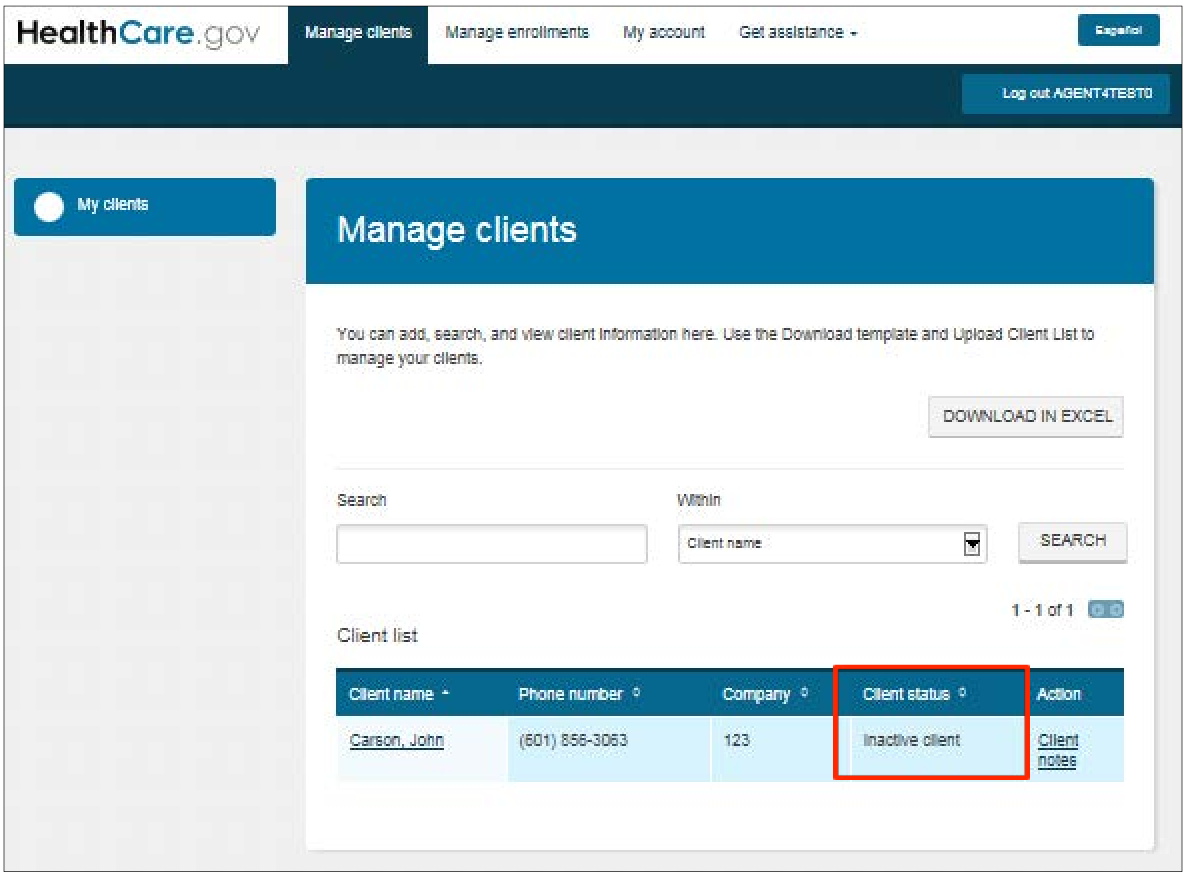
If an employer's authorization status is **INACTIVE**, you can update it to **ACTIVE**. If an employer decides not to use your services, the employer's status will automatically update to **INACTIVE**.

To change an employer's authorization status:

- Select the **Manage clients** tab. On the **My clients** page you'll see a list of your clients.
- Select the employer's name under the **Client name** field. On the **Edit client** page, you'll see employer details.
- Select the **CHANGE CLIENT STATUS TO INACTIVE** link. You'll get a confirmation that the employer's status is changed.
- Select **SAVE AND CONTINUE** to see the updates.




HealthCare.gov
Español
Log out AGENT4TEST0
My clients
Important
Are you sure you want to change the client to inactive?
CANCEL
CONFIRM
BACK TO MANAGE CLIENTS
Status: CLIENT
CHANGE CLIENT STATUS TO INACTIVE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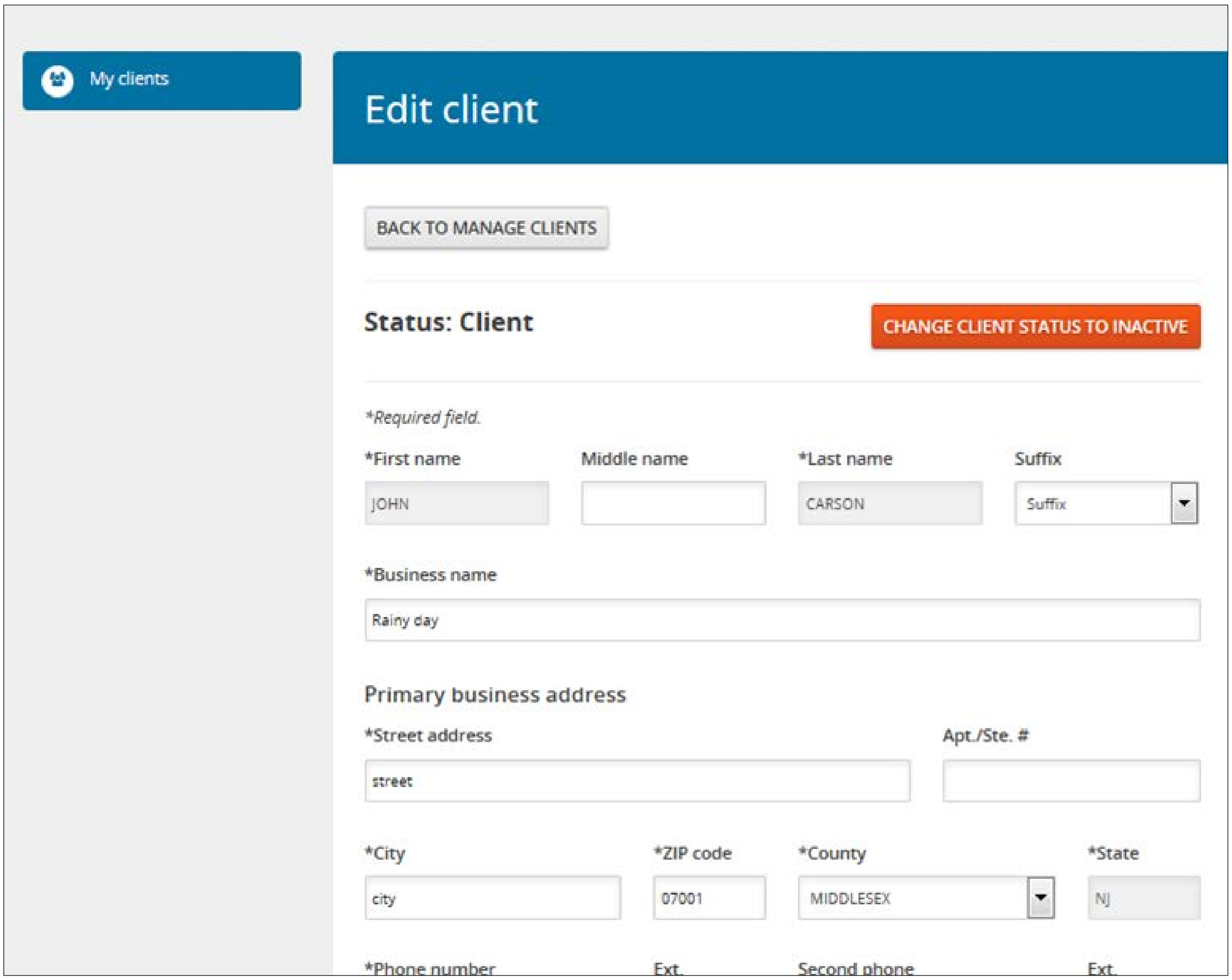
Manage clients
Manage enrollments
My account
Get assistance
Español
Log out AGENT4TEST0
My clients
Manage clients
You can add, search, and view client information here. Use the Download template and Upload Client List to manage your clients.
DOWNLOAD IN EXCEL
Search
Within
Client name
SEARCH
1 - 1 of 1
Client list
Client name
Phone number
Company
Client status
Action
Carson, John
(601) 856-3063
123
Inactive client
Client notes

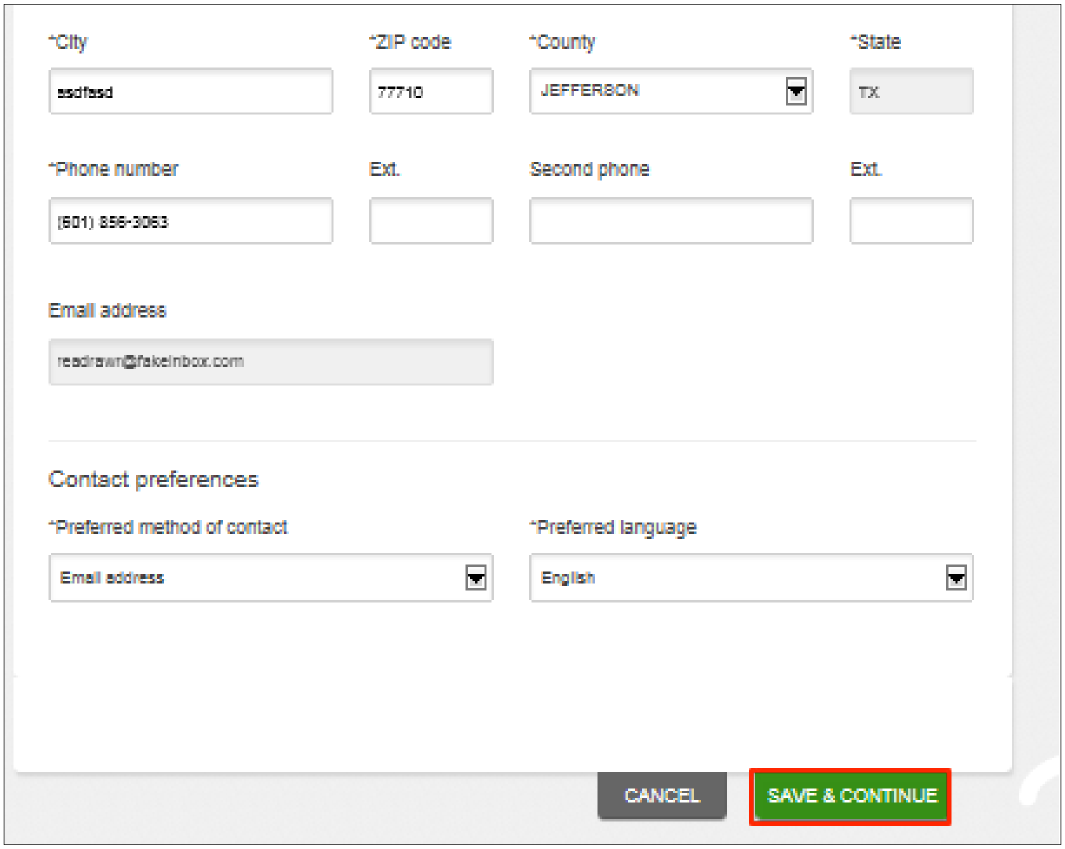
Editing an employer's information

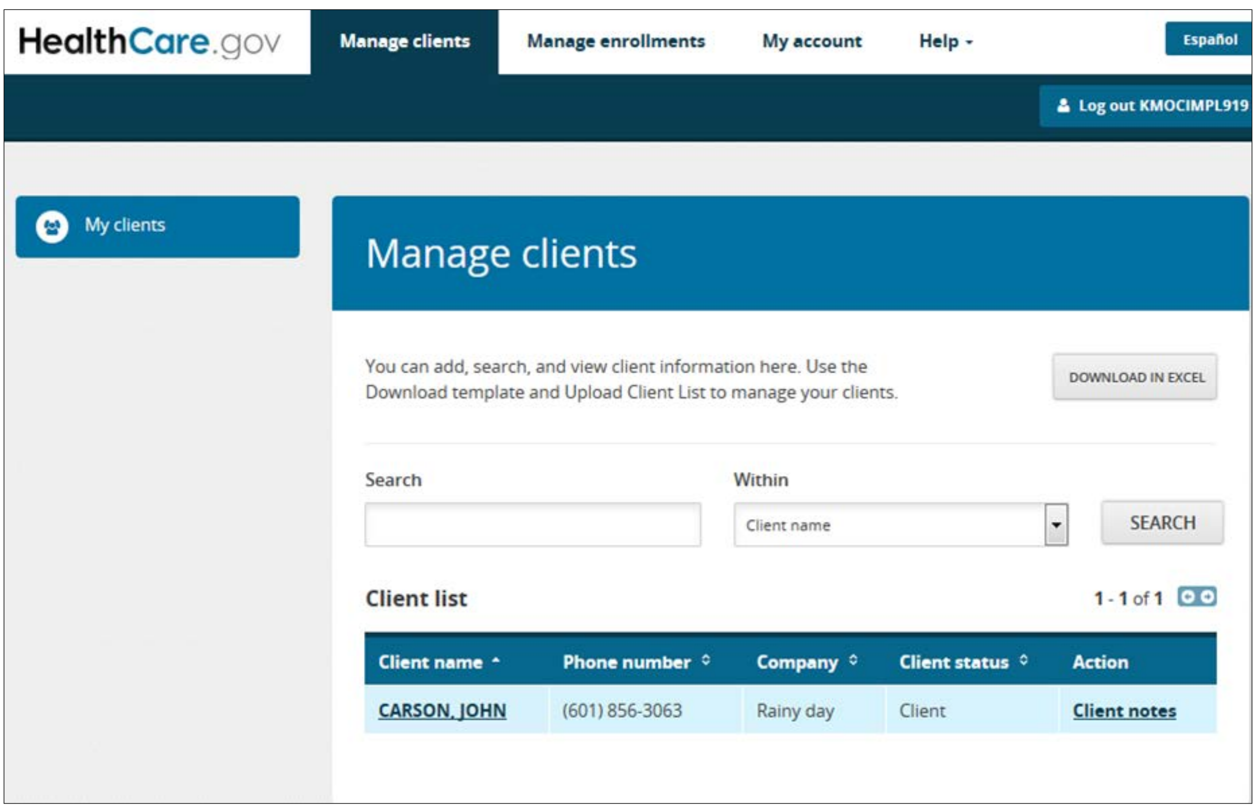
You can edit an employer's information once you've added the employer as a client. **Remember, employers have to give you authorization before you can help them in the SHOP Marketplace.**

To edit an employer's information:

- Select the **Manage clients** tab. On the **My clients** page, you'll see a list of your clients.
- Select the employer's name under the **Client name** field. On **Edit client** page, you'll see employer details.
- Select **SAVE AND CONTINUE** to confirm the changes.




*City
asdfasd
*ZIP code
77710
*County
JEFFERSON
*State
TX
*Phone number
(601) 856-3063
Ext.
Second phone
Ext.
Email address
readrawn@fakeinbox.com
Contact preferences
*Preferred method of contact
Email address
*Preferred language
English
CANCEL
SAVE & CONTINUE

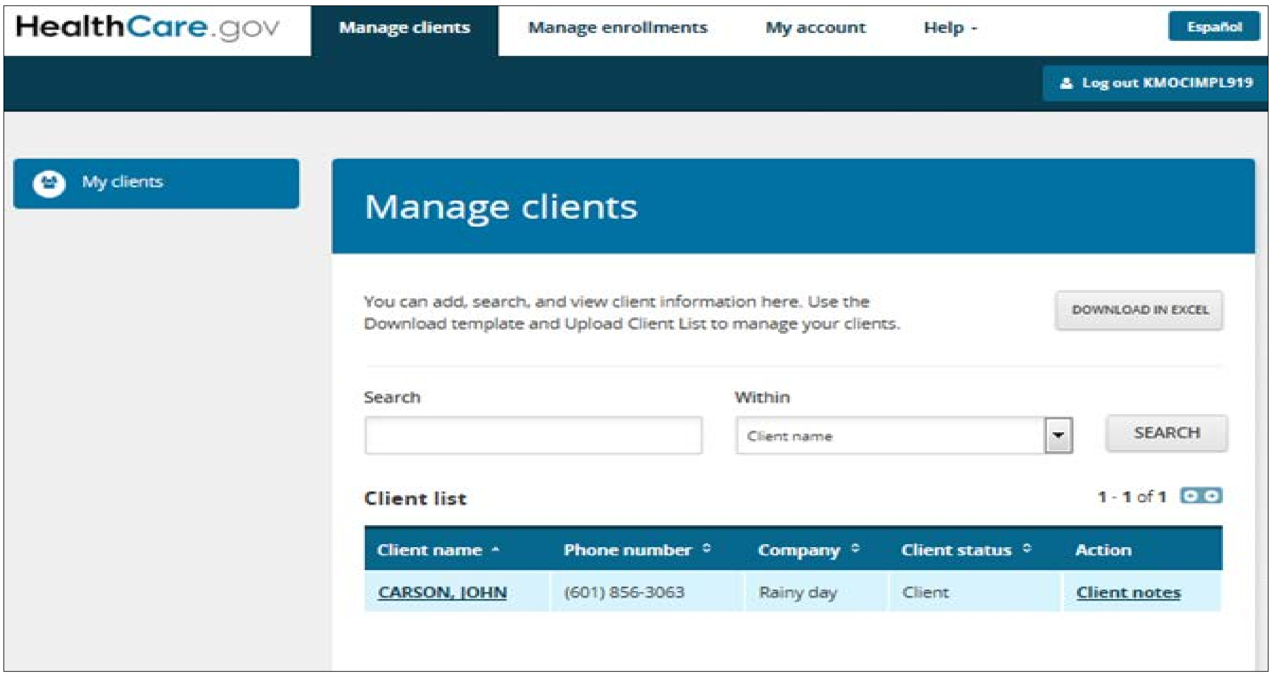

HealthCare.gov
Manage clients
Manage enrollments
My account
Help
Español
Log out KMOCIMPL919
My clients
Manage clients
You can add, search, and view client information here. Use the Download template and Upload Client List to manage your clients.
DOWNLOAD IN EXCEL
Search
Within
Client name
SEARCH
Client list
1 - 1 of 1
Client name
Phone number
Company
Client status
Action
CARSON, JOHN
(601) 856-3063
Rainy day
Client
Client notes

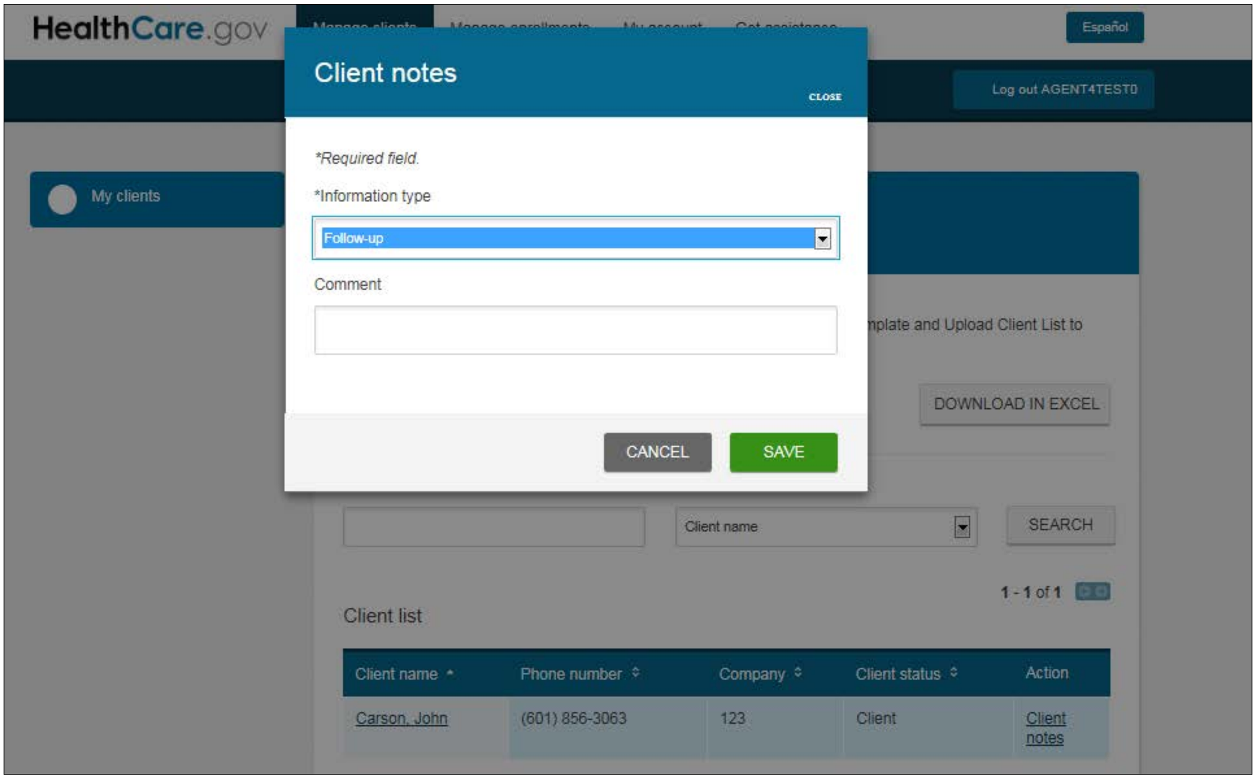
Adding client notes

You can add client notes for any employer that you're working with. To add client notes:

- Select the **Manage clients** tab to see a list of your clients.
- Select the **Client notes** link under the **Action** field of the client list to view the **Client notes** dialog box.
- Select the type of notes to be entered from the **Information type** drop down menu. Enter your comments in the **Comments** text box. Select **SAVE**.

You can follow this same process to review your notes. You'll see saved comments in the **Comments** text box.





Have questions or need help?

For more information on the SHOP Marketplace, visit HealthCare.gov/small-businesses.

Or you can contact the SHOP Call Center at 1-800-706-7893, Monday–Friday, 9 a.m.-7 p.m. EST. TTY users should call 711 to reach a call center representative.

If you have questions about the Health Insurance Marketplace, contact the Health Insurance Marketplace Call Center at 1-800-318-2596. TTY users should call 1-855-889-4325.

Product No. 11880
January 2015